Tell Your Boss Takeaways from **"Practical Concepts of Project Management for Tomorrow's MSP"**

Speakers: Michellene Kerr-Gordon, MBA, PMP

Thesis: Participants will gain a fundamental understanding of a few key basic project management concepts, and discover practical tools for real-life scenarios.

Learning Objective#1: To be able to distinguish between true projects vs. every day operations

Key points:

1. Projects have a defined beginning and end. **2.** They must accomplish a specific scope and produce a unique service, result, or other output. **3.** Minutes are a part of operations in that they are a regulatory associated activity while	action items are a project associated activity that outlines immediate next steps, due dates, responsible parties, and key decisions that will move the project along on its timeline toward it's desired conclusion.

Learning Objective#2: To be able to use specific communication tools to gather information and analyze next steps

Key points:

1. Framing your ask using key phrases will often prompt detailed responses. This information may then be used to refine requirements and ultimately the scope of the project. **2.** Documentation in the form of formalized agendas, action items, progress or status reports, and timelines will help keep everyone	involved on the project on the same page and focused on the desired end result. **3**. Lessons learned will provide valuable insights as to what we should do, keep doing , or don't do next time we are asked to tackle a similar project.

Learning Objective#3: To understand how some of the basic concepts of project management can benefit tomorrow's MSP

Key points:

1. Plan for the known-knowns and if necessary, how you will incorporate feedback into the next version of your output. **2.** Using communication and accountability tools, such as a RACI, chart, will help clarify roles and responsibilities for specific tasks **3.** At it's core, project management gives us the	ability to coordinate efforts to achieve a desired outcome. MSPs can use PM concepts such as stakeholder engagement, educating others, building consensus, and creating a plan in their every day work to achieve the results they seek.

Practical Concepts of Project Management for Tomorrow's MSP

Presented by Michellene Kerr-Gordon, MBA, PMP
NAMSS 48th Annual Education Conference

KEY PROJECT MANAGEMENT TERMS (from PMBOK 5th ed.)

Term	Definition
Agile	A highly adaptive project life cycle where the detailed scope is defined and approved before the start of an iteration. It uses progressive elaboration of requirements based on short, iterative planning and executing cycles (often referred to as 'sprints.') This type of life cycle typically requires a dedicated team of resources that can provide continuous feedback which is immediately used to improve the output.
Gantt Chart	A bar of schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown as horizontal bars placed according to start and finish dates.
Lessons Learned	The knowledge gained during a project which shows how project events were addressed or should be addressed in the future for the purpose of improving future performance
Project	A temporary endeavor that aims to create a unique product, service, or result
Project Life Cycle	The series of phases that a project passes through from its start to completion
Project Management	The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements
Scope	The sum of the products, services, and results to be provided as a project.
Sponsor	A person or group who provides resources and support for the project, program, or portfolio and is accountable for enabling success.
Stakeholder	An individual group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.

ACTION ITEMS TEMPLATE- (Designed for dissemination via e-mail)

<table>
<tr><td colspan="4" align="center">Name of Meeting
Meeting Date
Meeting Mode (Zoom, Phone, In-Person)</td></tr>
<tr><td colspan="4">

Key Takeaways:

➢ Add your key points for the meeting only. There should be a few points of background to make sure the context of the meeting is understood.
➢ The remaining bullets and sub-bullets should all pertain to pertinent information from the meeting
➢ Document the key decisions taken that will move the project forward.

Next Steps:
➢ This is section clarifies what everyone should expect to happen next: a subsequent meeting, a specific outcome or deliverable produced

</td></tr>
</table>

Action Item	Responsible Party	Due Date	Status
1. What items need to be accomplished because of having this meeting?	Who is it assigned to?	When is it due?	What's the status? PENDING IN PROGRESS COMPLETE
2. Locate the Epic resource responsible for the Epic ambulatory packet	Michellene Kerr-Gordon	10.06.23	PENDING

KEY QUESTION FRAMES

- Can you help me understand…?
- Tell me more about…?
- Walk me through…?
- Can you please clarify…?
- When you say X, do you mean…?
- What else…?

AGENDA TEMPLATE (next page)

OVERVIEW

Meeting Name	Care Delivery Team Meeting
Date/Time	Tuesday, September 17, 2019/ 1:00 PM ET
Duration	1.5 hours
Location	Zoom

ATTENDEES

P/A	Member(s)	P/A	Member(s)	P/A	Guest(s)
P	Michellene Kerr-Gordon				

*Note meeting attendees as **P**resent or **A**bsent.*

AGENDA

Time	Mins	Topic	Presenter/ Facilitator	Desired Outcome
1:00 PM	05	Reflection		
1:05 PM	10	Roll/Introductions		Information
1:15 PM	20	Opening Comments		Information
1:25 PM	45	Topic 1		Information, Discussion
2:10 PM	15	Topic 2		Decision
2:25 PM	05	Next Steps/Closing Comments		Information
2:30 PM		Adjourn		